Creating a Culture of Philanthropy: A URJ Resource
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Special Thanks

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Introduction

Creating a Culture of Philanthropy: A URJ Resource (a compendium to the URJ’s six-part online learning series of the same name) provides congregational leaders with articles, blogs, guides, speeches, and examples of materials that help define what a culture of philanthropy is and explore its roots in the Jewish tradition. This resource provides tools and materials to help congregational leaders understand and begin to adopt the principles and strategies associated with shifting away from traditional giving practices and moving toward a culture of philanthropy.

In particular, this volume focuses on understanding what a culture of philanthropy is, how it is different from what’s practiced in many congregations, and why now is the time to start exploring the transition. Additional volumes will provide resources for the detailed strategies and tactics necessary to create a congregational philanthropic culture.

Like any culture shift, making this transition will not be easy—regardless of the benefits. Creating a culture of philanthropy is not about putting in place new ways of doing our sacred business. It is about changing culture and placing the member and their experiences at the center of our work. While strategies and tactics are key components, these are ultimately all expressions of the larger culture change.

As hard as culture change may be, asking for money can be just as hard—and not just for those doing the asking:

A woman dies and finds herself in a small room furnished with a couch and TV. There’s another person sitting on the couch, watching the screen. “So, is this heaven or hell?” she asks the guy on the couch. “Well, there are no windows or doors and no apparent way out,” the man answers. “So, is it hell?” “I don’t know,” says the guy, without looking up. “They did give us this nice big TV.” “So maybe it’s heaven,” the new arrival says. “Maybe,” the other person responds, “but it has only one channel.” “Oh, so maybe it’s hell?” “Well,” the man says, “the station it gets is pretty good—it’s PBS.” “So, maybe this is heaven after all?” the woman asks. “Yeah, except for one thing,” the guy says sadly. “It’s always pledge week!”
Defining a Culture of Philanthropy

If you are like most people, you don’t like asking for money. Simone Joyaux, an internationally recognized development expert and founder of Joyaux Associates, understands. At the end of this op-ed in Nonprofit Quarterly she offers ten insightful reasons why people are uncomfortable with fundraising and see soliciting like being in hell. Whether you feel like you’re in hell, heaven, or limbo, as a synagogue leader you know the need to raise funds is more critical than ever, particularly with the ongoing decline of dues and changes in dues models.

For decades, congregational leaders have looked beyond dues income to fund their congregations (see Rabbi Dan Judson’s book Pennies for Heaven: The History of Synagogues and Money). Historically, these non-dues funds have been raised a variety of ways, mostly through practices that would be classified as fundraising and not philanthropy.

Fundraising is not philanthropy. Fundraising is transactional and focuses on asking for money because an entity needs it. Philanthropy is relational and aims to provide everyone with a way of expressing their personal values through charitable giving. (Check out this fun and informative video that illustrates the point.)

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Philanthropy</th>
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<tbody>
<tr>
<td>• Disjointed activities</td>
<td>• Relationship-based</td>
</tr>
<tr>
<td>• Little strategy</td>
<td>• Mutually rewarding experience</td>
</tr>
<tr>
<td>• Little analysis</td>
<td>• Strategic</td>
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<tr>
<td>• Do it because it’s always been done</td>
<td>• Aspirational</td>
</tr>
<tr>
<td>• Heavy focus on events</td>
<td>• Meaningful</td>
</tr>
<tr>
<td>• Little professional expertise or support</td>
<td>• Appreciative</td>
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While some may say this is just semantics, it is not. (The author is, in fact, “anti-semantic.”) The words we use are powerful and convey tremendous meaning and impact. Throughout this resource, readers will be reminded and taught why, in building a culture of philanthropy, our words can help us succeed and reorient our relationships or they can fail and cause us to come up short. (Want to dive deeper into the power of language and word choice? See the Additional Resources section at the end of this volume.)

At its core, philanthropy and a culture of philanthropy is about the people who are giving, not about the institutions using the funds. This is a major shift, and it parallels the contemporary shift taking place across the synagogue spectrum from programming to engagement.

Now, more than ever, relationships, engagement, and connectivity are central to creating dynamic congregational communities. (If you have not yet read Dr. Ron Wolfson’s Relational Judaism: Using the Power of Relationships to Transform the Jewish Community, tomorrow is not soon enough and yesterday is too late.) Successfully connecting people to our sacred communities requires multiple strategies and techniques. Where once programs and services played the central role in synagogue life, today we recognize that understanding our congregants’ desires and interests, and providing them with meaningful ways to relate to and interact with others, is the most effective way to strengthen community and have an impact on individuals’ lives.

An often misunderstood but vital strategy in connecting and engaging people in Jewish life is philanthropy. Philanthropy, which derives from the Greek philo (loving) and anthropo (humankind), places the individual who gives or may give—and not the institution—at the focal point.

Within synagogue life, in particular, philanthropy is a means to engage in intimate relationships by providing individuals with a way to express their values and Jewish identity through fulfilling their charitable aspirations.
Experimenting with Principles

Temple Sholom of Vancouver is in the midst of a systematic culture change. After a year-long project focused on identifying the benefits of shifting to a culture of philanthropy the leaders at Temple Sholom have begun to initiate a number of strategies. One of the largest undertakings will see leaders having one-on-one conversations with each member who pays dues to better understand their motivations and interests. (To make this a manageable endeavor, leaders are meeting with about a third of the members per year; after three years, they will have met with all members.) The discussions will not be solicitations; they will provide the congregation’s leader with the opportunity to learn about and share the impact the congregation is having in congregants’ lives. This program is designed to make dues far less transactional, deepen leaders’ knowledge of their members, and strengthen the relationships between leaders and members. Striving for an even greater impact, these will not be one-off conversations. Instead, these conversations will, in fact, occur every three years or so—relationship-building never ends.

Building these relationships requires learning the art of listening, rather than telling, a notion supported by Wolfson in Relational Judaism (pgs. 141–147). This enables congregational leaders to better understand the donor’s philanthropic aspirations and desires. Understanding donors on this level provides congregational leaders with the opportunity to become the donors’ philanthropic partner, thus leading to a mutually rewarding experience in which donors can dream big and feel positive about their acts, and the organization is able to ensure impact. As a result, the act of giving is made more meaningful, and the donor truly feels they made a difference.1

Best Principles

1. Philanthropy is not charity for the wealthiest. While Pastor Eugene Cho speaks in his TEDx Talk about poverty, the essence of his message is that everyone can be a philanthropist because it is about the donor, not the size of the gift.

2. Philanthropy begins and ends with the donor and their desire to make an impact. Creating relationships is key. (To understand the real impact on the donor, watch this TEDx Talk by Jim Hodge.)

3. Fundraising is transactional and focuses on the needs of the institution. Philanthropy is relational and focuses on providing opportunities, based on knowledge about the donor, for the donor to express their charitable aspirations and desire to improve the world.

4. Getting to know people on a personal level and understanding their desires and wishes provides the foundation for successful philanthropic relationships.

1. A direct result of such a partnership is that donor attrition decreases significantly. For more on this topic, read the first chapter of Building Donor Loyalty: the Fundraisers Guide to Increasing Lifetime Value by Adrian Sargeant and Elaine Jay.
“If not now, when?”
Transitioning Today to a Culture of Philanthropy is More Important than Ever

Charitable giving to nonprofits continues to increase each year. The Social Sector's annual giving report indicates that over the past several years more people are giving increasing amounts. Although religious giving remains stagnant, it still makes up the largest charitable sector.

For synagogues this means more members have opportunities to make their charitable gifts in more places. Numerous studies (as cited in efjewish Philanthropy here and here and in this “Connected to Give” Jumpstart study) have also indicated that the Jewish community consistently gives large gifts across the spectrum. The reasons people give so much elsewhere is complex. The good news, however, is that these giving patterns affirm why synagogue leaders have a great opportunity if—and only if—they can engage with people in a manner that excites and enthuses them, developing and deepening strong connections.

As Rabbi Hillel said, “If not now, when?” (Pirkei Avot 1:14) Between those members who give elsewhere, those who give out of responsibility but not passion, and those whose days on Earth are less than those they have lived, now is the opportunity to engage, relate, and partner with congregants.

**BEST PRINCIPLES**

1. Education and information are key.
   - Conduct a board retreat and staff training
   - Watch the URJ’s six-part online learning series, *Creating a Culture of Philanthropy* (find outlines, slides, and webinar recordings in The Tent by searching topic tag #CultureofPhilanthropyLearningSeries)

2. Strong partnerships between the professionals (particularly the clergy), the volunteer leaders, and the congregants lead to successful philanthropic efforts.
   - “Do You Know Where Your Development Director is Right Now?,” from Dynamic Change Solutions
3. Prepare now, work later.
Recognize and create strategies for the three primary stages of creating a culture of philanthropy:
- Obtaining buy-in (see John P. Kotter’s *Buy-In: Saving Your Good Idea from Getting Shot Down*)
- Identifying and establishing new strategies
- Addressing culture and planning for cultural resistance (see this URJ Biennial presentation by Dr. Rob Weinberg about transitions)

4. “You say ee-ther, I say eye-ther” – It’s all about language.
There are multiple blogs about this subject. If you search language or words with fundraising or philanthropy you will find countless opinions that have similar messages about the importance of words, messaging, and putting the donor first. (See the Additional Resources section for some starting points.)

5. Know where you are, where you’re going, and how you’ll get there.
After completing a self-assessment to determine where you are, create a comprehensive multi-phased implementation plan to help you reach your philanthropic goals. These congregations have embarked on the journey and are in different places along the path:
- Temple Sholom of Vancouver, Vancouver, British Columbia
- Peninsula Temple Sholom, Burlingame, CA
- Congregation Rodeph Sholom, Philadelphia, PA
- Har Hashem, Boulder, CO
Conclusion:
“If there is no Torah, there is no sustenance—if there is no sustenance, there is no Torah.”

(Pirkei Avot 3:21)

Just as celebrating Shabbat and performing acts of social justice are core elements of the Jewish tradition, so too is philanthropy. The resistance that is felt by many concerning fundraising is far more reflective of the Western world’s view of money than it is of Judaism’s. Pirkei Avot (one of the sections of the Talmud) clearly links, in a symbiotic relationship, a life of Torah with financial support (Pirkei Avot 3:21). In a similar way, the famous High Holiday prayer Un’taneh Tokef (“who shall live and who shall die”) states explicitly that the evil degree is annulled in part by acts of tzedakah. It is thus not a stretch to see that when you provide potential donors the opportunity to give you are providing another opportunity for them to express their Jewish experience and journey. The act of providing financial resources to support our religious institutions goes back to the initial days of our Jewish heritage.

Rabbi Jacob Neusner taught, “The act of tzedakah by definition is holy. When you work for tzedakah, you are doing the equivalent of prayer or study or keeping the Sabbath or carrying out any other mitzvah.”

2. (Tzedakah: Can Jewish Philanthropy Buy Jewish Survival?, Jacob Neusner, URJ Press, p.77)
Jewish texts to frame conversations about philanthropy

Jewish literature is replete with passages that encourage us to give, and to give generously. The most famous of these passages specifically speak to giving not only as a religious mandate but as an expression of our values and passion:

“Jacob then made this vow: ‘If God…gives me bread to eat and clothes to wear…I will dedicate a tenth to You [God]’.”  
(\textit{Genesis} 28:20, 22)

“The Eternal One spoke to Moses, saying: ‘Tell the Israelite people to bring Me gifts (\textit{t’srumah}); you shall accept gifts for Me from every person whose heart is so moved. ...And let them make Me a sanctuary that I may dwell among them.’”  
(\textit{Exodus} 25:1–2,8)

“This is what everyone who is entered in the records shall pay: a half-shekel by the sanctuary weight—twenty \textit{gerahs} to the shekel—a half-shekel as an offering to the Eternal. Everyone who is entered in the records, from the age of twenty years up, shall give the Eternal’s offering: the rich shall not pay more and the poor shall not pay less...”  
(\textit{Exodus} 30:13-15)

“If, however, there is a needy person among you, one of your kin in any of your settlements in the land . . . do not harden your heart and shut your hand against your needy kin. Rather, you must open your hand and lend whatever is sufficient to meet the need.”  
(\textit{Deuteronomy} 15:7–8)

“Three times a year—on the Feast of Unleavened Bread, on the Feast of Weeks, and on the Feast of Booths—all your males shall appear before the Eternal your God in the place that God will choose. They shall not appear before the Eternal empty-handed...”  
(\textit{Deuteronomy} 16:16)

“Rabbi Assi said, ‘Tzedakah is as important as all the other commandments put together.’”  
(Babylonian Talmud – \textit{Bava Batra} 9a)

“A poor person who is your relative should receive your support before all others; and likewise the poor of your own household have priority over the poor of your city; and the poor of your city have priority over the poor of another city, as it is stated [in Deuteronomy 15:11] ‘open your hand to the poor and needy kin in your land.”  
(Mishneh Torah 7:11)

“May [the one] who blessed our ancestors...bless...those who unite to establish synagogues for prayer, and those who enter them to pray, and those who give funds for heat and light, and wine for Kiddush and Havdalah, bread to the wayfarer and charity to the poor, and all who devotedly involve themselves with the needs of this community and the Land of Israel.”  
(Shabbat morning service) Translation from \textit{Siddur Sim Shalom} (Rabbinical Assembly, 1989).

“Whoever establishes for oneself a place to pray will receive the help of God.”  
(Babylonian Talmud – \textit{Berachot} 8a)

“A community is too heavy for anyone to carry alone.”  
(\textit{Deuteronomy Rabbah} 1:10)

“Who stimulates others to do good is greater than the doer.”  
(Babylonian Talmud – \textit{Bava Batra} 9)

“As our parents planted for us before we were born, so do we plant for those who will come after us.”  
(Babylonian Talmud, based on \textit{Taanit} 23a)
Additional Reading

Making the Cultural Shift from Fundraising to Philanthropy

• “Shifting from a Fundraising to a Philanthropic Culture,” Andrea McManus
• “Building a Culture of Philanthropy in Your Organization,” Simone Joyaux
• “A Shift from Fundraising to Philanthropy: What We Really Need to Consider,” Tarsha Whitaker Calloway
• “Eight Questions to Ask Before Building a Culture of Philanthropy at Your Non Profit,” The Chronicle of Philanthropy
• “Charitable Fundraising vs. A Culture of Philanthropy: What is the Significance for Your Nonprofit Organization,” Alyssa Kaelin

The Power of Language and the Importance of Word Choice

• Glossary of fundraising terms and phrases, from CFRE (Certified Fund Raising Executive) International
• “The Power of Language,” young people give a TEDx Talk about what language can do
• Word Choice, tips and suggestions from The Writing Center at the University of North Carolina at Chapel Hill
• Grammarphobia.com, a website devoted to parsing language
• The Allusionist, the self-described podcast about language; host Helen Zaltzman explores etymology and usage